

Charter Workshop – June 2014



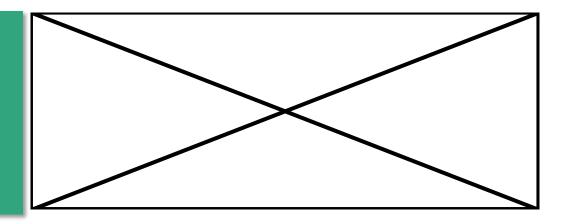
We're so glad you're here! Please take this time to network with other leaders, find a seat, and create a name tent for yourself.

Your name tent should include:

- •Your name
- Your school or network
- Your position



Workshop will begin in:





### Welcome & Overview of Mayor's Vision

MSCS Oversight & Reporting Requirements

**MSCS Charter Amendment Guidelines** 

OEI Updates & 2014-15 Meeting Calendar

**NWEA Presentation (Optional)** 



We're excited to share a lot of updates and information with you today!

### **Logistics & Information**

- Restrooms
- Index Cards for Questions





### *In low-income communities across our country*<sup>1</sup>....

### Offet Johnat führt litt für gliche der jeine bereite der jeden der

	4th Grade ISTEP+ Pass Rates <sup>2</sup>	Graduation Rates <sup>3</sup>	Graduates Passing AP Exam <sup>3</sup>
IPS	51% pass	65% graduate	4% pass
Lawrence	59% pass	84% graduate	29% pass
Wayne	63% pass	88% graduate	28% pass
Zionsville	91% pass	97% graduate	57% pass

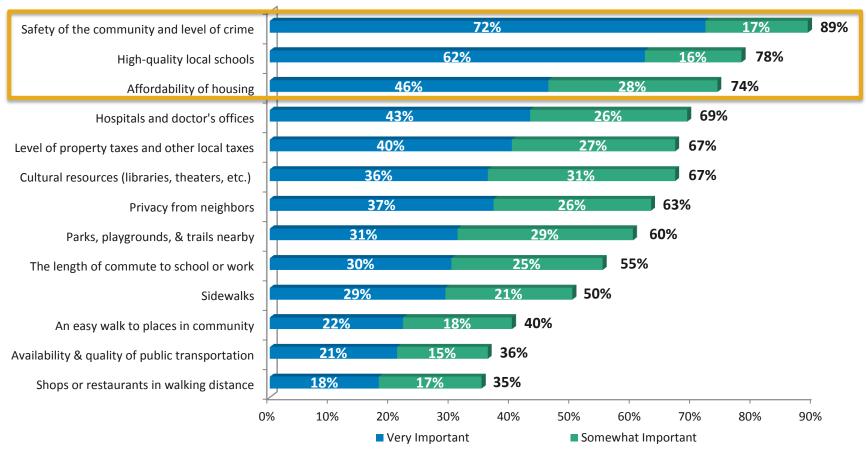
<sup>&</sup>lt;sup>1</sup>Teach For America

### The stakes are high for our neighborhoods



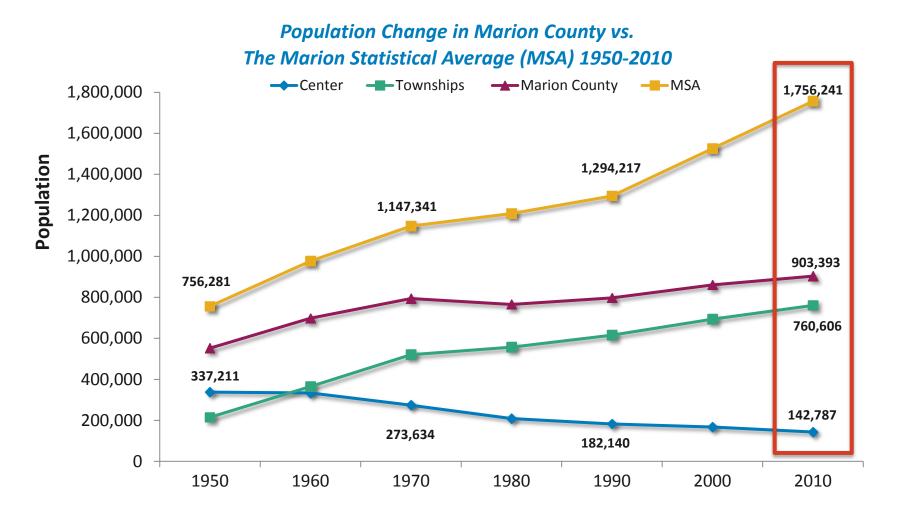
Based on the Community Preference Survey, there are three main factors that most influence where residents choose to live: safety, schools, and housing. These must be a focus of our ongoing efforts.

### Importance of Neighborhood Features and Amenities<sup>1</sup>





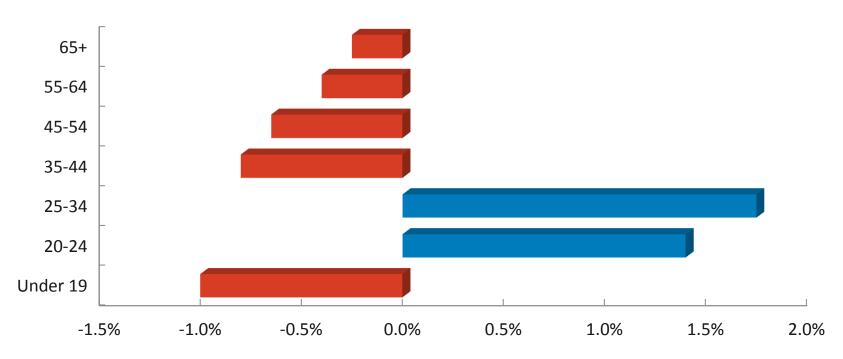
According to a recent campaign of "What's Possible?" community conversations, 83% of questionnaire respondents agreed that the quality of local schools is a critical factor in where they choose to live.





Families with school-aged children are leaving our city in comparison to our surrounding counties. This negatively affects the fiscal health and competitive position of our city by causing tax revenue, social capital, and political capital to decline.

### Marion County Population by Age Relative to MSA<sup>1</sup>



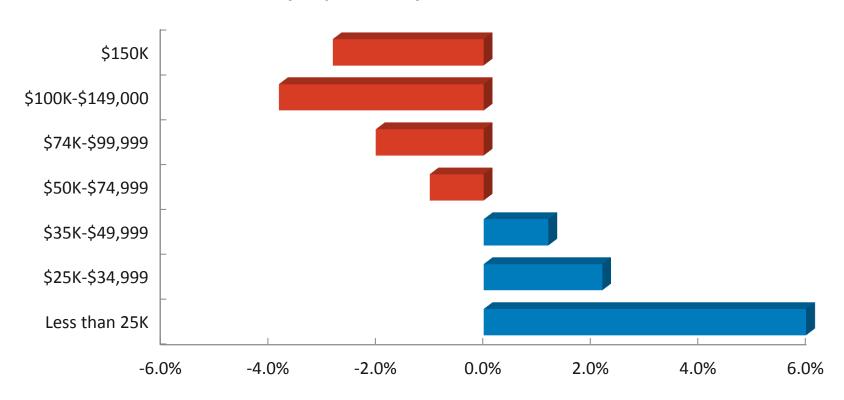
The bars show the difference between the share of each cohort in Marion County relative to the share in the MSA (e.g., Marion County has a nearly 1.5% percent higher share of 20-24 year olds than the MSA as a whole).

## These population shifts create a significant loss in tax revenue for public safety and other investments



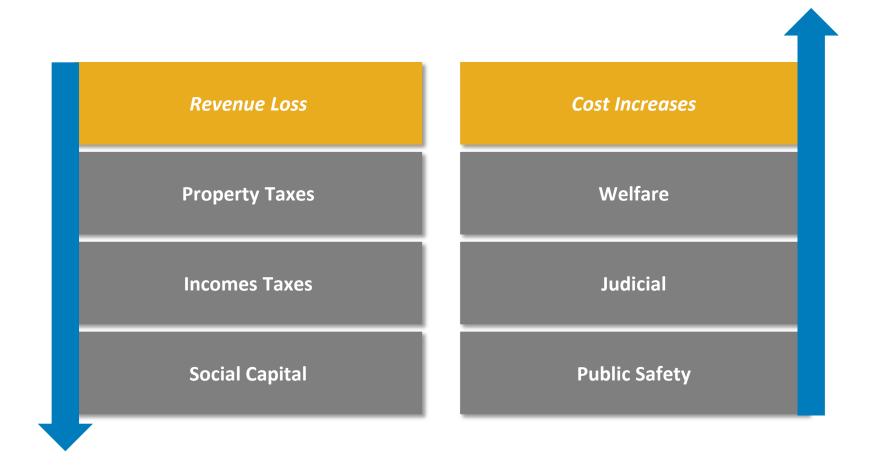
The families leaving our city have the greatest earnings and earnings potential thereby multiplying the impact of the problem. We will be unable to support the residents living here if we continue to lose these residents.

### Marion County Population by Income Level Relative to MSA<sup>1</sup>





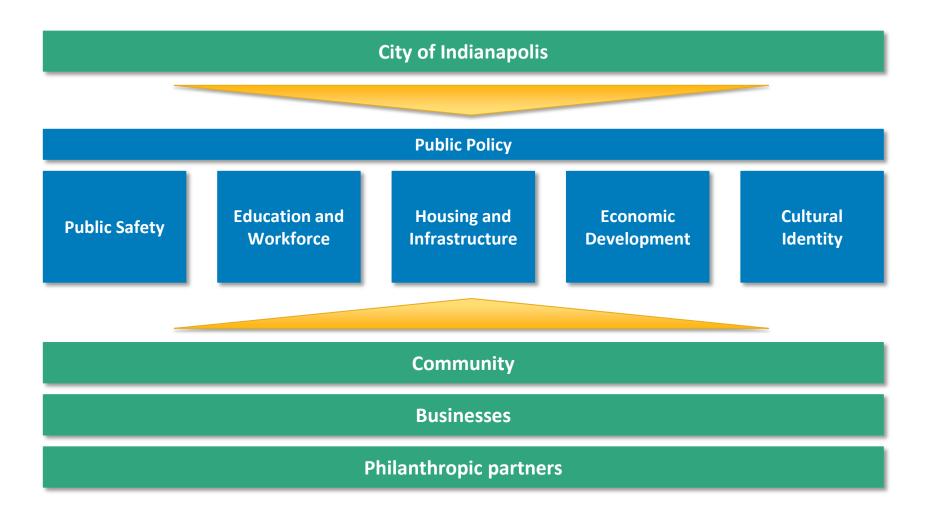
Without these residents, we have fewer resources to invest in public safety, infrastructure, and to address the challenges associated with poverty.



### The best city to live, work and raise a family



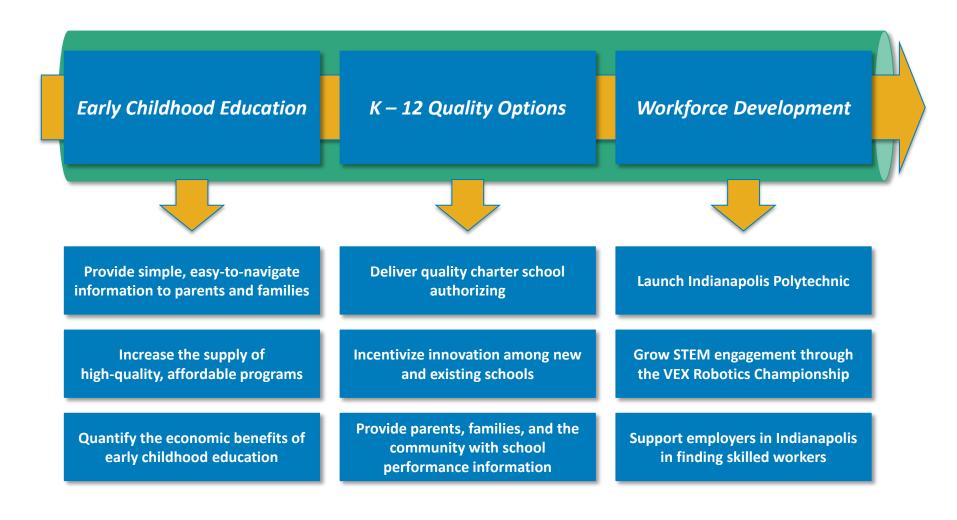
Our vision focuses on public safety, education and workforce, housing and infrastructure, economic development, cultural identity, and public policy in partnership with the community, businesses, and philanthropic organizations.



### Mayor Ballard's vision for education



All children in every neighborhood deserve access to an education that enables them to define their own life path. Commitment to this vision begins with early childhood education, continues through K-12 options and lasts through higher education and workforce development.





Our vision is to work collaboratively with the community to provide high-quality and innovative school options that meet the diverse needs of students, families, and our city.



### Welcome & Overview of Mayor's Vision

### **MSCS Oversight & Reporting Requirements**

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NWEA Presentation (Optional)

### **Master Calendar of Reporting Requirements**



We've made several changes to the Master Calendar of Reporting Requirements in an effort to minimize reporting while complying with charter statute. A brief highlight of changes is below. This list does not encompass all changes.

Added/Revised

Removed

## DOE-RT & DOE-STN Reports

- Required to calculate Indicator 1.4
- Submitted twice/year (October & March) in a provided template

Vendor Management Verification

- Required to submit verification of pre-audit planning in a provided template
- Vendor management is required for timely submission of audits

Formative
Assessment Results

Will be accessed through IDOE Data Sharing Agreement & NWEA Partnership

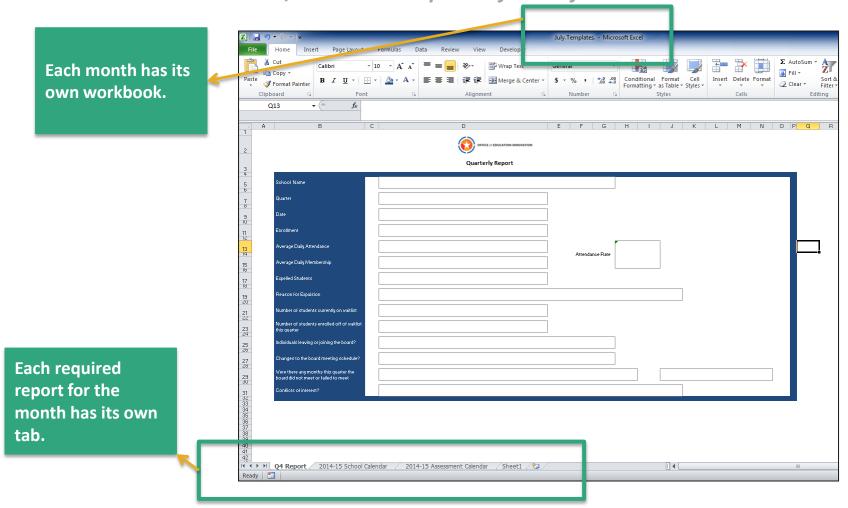
Quarterly Compliance Letter

- Adjusted to an annual letter assuring compliance with all applicable laws
- Allows fewer reporting requirements related to financial curriculum, SpEd, etc.

### **NEW!** Master Calendar Templates



During the 2013-14 school year, many schools expressed a desire for an expected format for all documents. OEI has developed templates for all compliance documents to be submitted, with the exception of some financial documents.



### **NEW!** Quarterly Report Template



	Quarterly Report	
School Name		
Quarter		
Date		alidation ontrolled
Enrollment	<b>←</b>	ontroneu
Average Daily Attendance	Auto-calculating Attendance Rate	
Average Daily Membership	Auto-carculating Auto-raiculating	
Expelled Students		
Reason for Expulsion		
Number of students currently on waitlist		
Number of students enrolled off of waitlist this quarter		
Individuals leaving or joining the board?		
Changes to the board meeting schedule?		
Were there any months this quarter the board did not meet or failed to meet		
Conflicts of interest?		





### Performance Framework for Elementary/Middle & High School



While there are no major substantive changes to the performance frameworks, there have been minor adjustments in a few areas.

### **Core Question 1: Academics**

No changes

#### **Core Question 2: Finances**

 Revised rating levels to recognize schools that have met standard for all subindicators and make overall ratings more predictable

### **Core Question 3: Governance**

- Updated language for consistency
- Added organizational goals

No changes to Core Question 4: Conditions for Success

### **Changes to Core Question 2: Financial Indicators**



Rating levels have been revised to recognize schools that meet standard for all subindicators and to make overall ratings more predictable. Let's walk through an example using the short-term health indicator, 2.1.

	2013-14 Roll Out	2014-15 Revision
Exceeds Standard	Rating not available.	School meets standard on all sub-indicators.
Meets Standard	School meets standard for all sub-indicators.	School meets standard on 4 sub-indicators and approaches on the remaining sub-indicator.
Approaching Standard	School presents concerns in no more than one sub-indicator.	School meets standard on 4 sub-indicators and does not meet standard on the remaining OR school meets standard for 3 sub-indicators and approaches for remaining 2.
Does Not Meet Standard	School presents concerns in more than one sub-indicator.	School does not meet standard on 2 or more sub-indicators.

### **Changes to Core Question 2: Financial Indicators**



Based on Indicator 2.1, below are a variety of scenarios that could lead to each rating level.

	Enrollment Variance	Feb. Enrollment Variance	Current Ratio	Days Cash on Hand	Debt Default
Exceeding standard	MS	MS	MS	MS	MS
Meeting standard	MS	MS	MS	AS	MS
Approaching standard	MS	AS	AS	MS	MS
	DNMS	MS	MS	MS	MS
Does not meet standard	DNMS	MS	MS	DNMS	MS

# Changes to Core Question 2: Procedural changes that can impact a school's ratings



It is important for schools to manage their vendors to ensure that all services are rendered in a timely manner. This includes the audit process.

### The audit MUST be submitted to SBOA by November 30, 2014.

### Why it matters

- OEI is required by statute to provide all schools with an annual accountability report
- Timely receipt of audit allows OEI to provide schools with feedback that can by used in second half of fiscal year

### Consequences

 Late submission will result in the school not meeting financial reporting requirements in its accountability report

# Changes to Core Question 2: Procedural changes that can impact a school's ratings



OEI strives to make compliance meetings collaborative and thought-provoking. This is not possible without timely submission of financial data.

Statements are due on the 1<sup>st</sup> of each compliance month or FOUR business days prior to meeting.

**Statements include:** 

- Profit & Loss (including budget to actuals)
- Balance sheet

What happens if documentation is NOT received FOUR business days prior to meeting?

#### **First Occurrence**

- OEI will run data against performance framework
- Written Warning

#### **Second Occurrence**

- OEI will NOT run data against performance framework & will expect the school's representative to walk OEI through statements
- OEI reserves the right to document concerns in accountability report





## **Changes to Core Question 3: Minor changes to governance & leadership indicators**



Sub-indicators were added to all rating levels for consistency, and to better distinguish between meeting and exceeding standard.

### 3.1: School Leadership – Meets Standard

## 3.1: School Leadership – Exceeds Standard

2013-14 Example 3.1: School Leadership

- Sufficient experience
- Stable leadership
- Effectively communicates
- Abides by all policies
- Clear roles and responsibilities
- Mid-course corrections
- Communicates mission and vision
- · Communicates with board

- Exceptional experience
- Effectively communicates
- Mid-course corrections
- · Communicates with board

2014-15 Example 3.1: School Leadership

- a) Sufficient experience
- b) Stable leadership
- c) Effectively communicates
- d) Abides by all policies
- e) Clear roles and responsibilities
- f) Mid-course corrections
- g) Communicates mission and vision
- h) Communicates with board

- a) Exceptional experience
- b) Stable leadership
- c) Effectively communicates
- d) Abides by all policies
- e) Clear roles and responsibilities
- f) Mid-course corrections
- g) Communicates mission and vision
- h) Communicates with board

# **Changes to Core Question 3: Minor changes to governance & leadership indicators**



Indicator language was revised for additional consistency...

	3.2: Compliance – Approaching Standard	3.2: Compliance – Meeting standard	3.2 Compliance - Exceeding Standard
2013-14 Example	a) Submission of all required compliance documentation in a timely manner	a) Submits all required compliance documentation in a timely manner	a) The school is consistent in the submission of all compliance documentation in a timely manner
2014-15 Fxample	a) Submission of all required compliance	a) Submission of all required compliance	a) Submission of all required compliance

2014-15 Example

- Submission of all required compliance documentation in a timely manner
- a) Submission of all required compliance documentation in a timely manner
- a) Submission of all required compliance documentation in a timely manner

### **Changes to Core Question 3: School-specific non-academic goals**

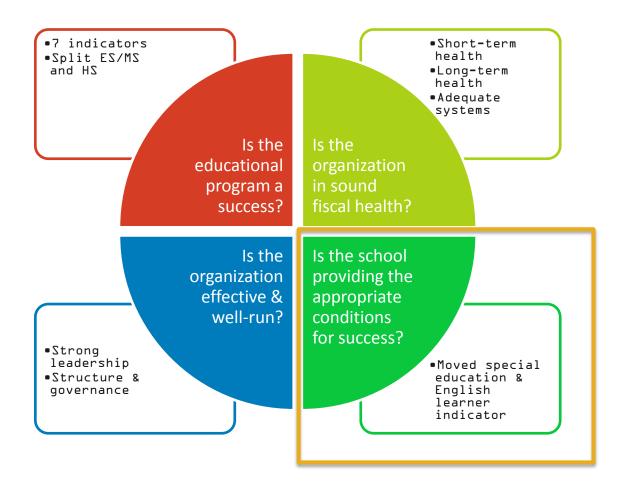


The performance framework did not allow us to hold schools accountable for organizational measurements laid out in the charter agreement. The additional of an school-specific non-academic goal indicator will allow for this accountability.

3.6. Is the school meeting its school-specific non-academic goals?		
Exceeds standard	TBD: Metrics determined based on school-specific non-academic goals, in conjunction with the school.	
	School is exceeding standard on both school-specific organizational goals.	
Meets standard	TBD: Metrics determined based on school-specific non-academic goals, in conjunction with the school.	
	School is 1) meeting standard on both school-specific educational goals, OR 2) meeting standard on one school-specific educational goal while exceeding standard on the second goal.	
Approaching standard	TBD: Metrics determined based on school-specific non-academic goals.	
	School is 1) approaching standard on one goal, while not meeting standard on the second, 2) approaching standard on both goals, OR 3) meeting standard on one goal, while approaching standard on the second.	
Does not meet standard	TBD: Metrics determined based on school-specific non-academic goals, in conjunction with the school.	
	School does not meet standard on either school-specific organizational goal.	



While there are no changes to Core Question 4 from 2013-14 school year, there were updates to the external evaluation policies in 2013-14 that have not been shared with all schools to date.



### When is Core Question 4 evaluated?



OEI has updated the timeline of evaluations to be clear and streamlined, while still allowing for Accountability Reports to be completed in a timely manner. All site visits are required to be completed during the fall semester in a timeframe that allows the consultant to deliver a final report to OEI by December 31.

First charter term

- 2<sup>nd</sup> year site visit
- 4<sup>th</sup> year comprehensive review
- 6<sup>th</sup> year renewal visit

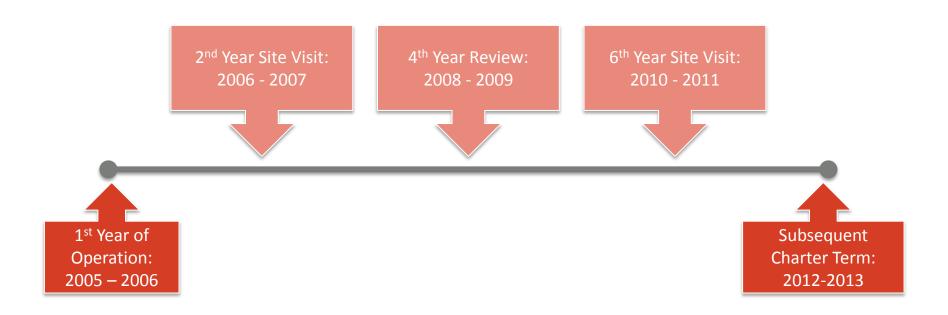
Any subsequent charter term

- 3<sup>rd</sup> year comprehensive review
- 6<sup>th</sup> year renewal visit

### **Core Question 4 Evaluations: First Charter Term**



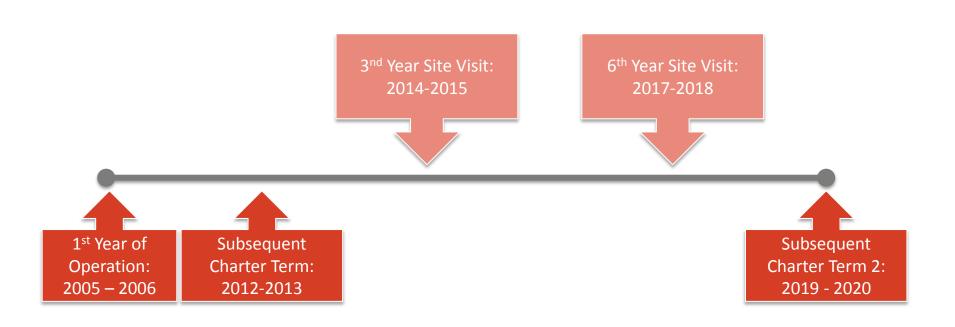
In the first charter term, schools receive **three evaluations** of Core Question 4. The example below illustrates the years in which a school opening in Fall 2005 would receive a site visit.



### **Core Question 4 Evaluations: Subsequent Charter Terms**



In subsequent charter terms, schools receive **two evaluations** of Core Question 4. The example below illustrates the years in which a school opening in Fall 2005 would receive site visits during a subsequent charter term.



### Who conducts Core Question 4 evaluations?



OEI has vetted the following list of external evaluators, who have all agreed to conduct site visits and provide ratings on Core Question 4 of the performance framework. OEI will gladly meet with additional consultants when recommended.

Research & Evaluation
Resources
Dr. Mary Jo Rattermann

School Organizational
Solutions
Dr. Terrence Harewood

Marian University
Dr. Lindan Hill

SchoolWorks
Kim Wechtenhiser

### When is my school's next required evaluation?



OEI notified schools required to have a site visit in Fall 2014 in March. The 2014-15 Handbook includes a full calendar of required evaluations for all schools.

## **External Evaluation Calendar** 2YSV 2nd year site visit 3YSV 3<sup>rd</sup> year site visit 4YCR 4<sup>th</sup> year charter review 6YR 3<sup>rd</sup> year site visit 6YR 6<sup>th</sup> year review







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### **MSCS Charter Amendment Guidelines**

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### **Charter amendment guidelines and template**



This document was designed to help answer the question: Do I need an amendment for this? Though it is meant to be thorough, never hesitate to ask OEI if you are in doubt.

An amendment is necessary if there are ANY changes in the following categories:

- Location of school
- Enrollment structure / grade levels served
- Entry into contract with CMO, EMO or ESP



This document was designed to help answer the question: Do I need an amendment for this? Though it is meant to be thorough, never hesitate to ask OEI if you are in doubt.

An amendment is necessary if there are any MATERIAL changes in the following categories:

- Governance/Organizational structure
- Enrollment capacity
- Changes in contract(s) with CMO, EMO and/or ESP
- Charter school facility
- Budget and finances
- Academic or instructional programming



The document also highlights several examples of material vs. immaterial changes. Though an amendment may not be required, it is crucial to always communicate the changes with the Director of Charter Schools or an analyst.

This is only one example. Please refer to the Amendment Guidelines In Section 4 of your handbook.

#### **Material changes**

- School mission: e.g., moving from a "STEM-based" mission to one focused on "leadership development"
- School goals: includes goals documented in charter and assessment methods used to monitor progress
- Education model: e.g., Core Knowledge, Project Lead The Way, AP, IB, dual credit, etc.
- Number of instructional days

#### **Immaterial changes**

- Course sequence or daily course schedule (so long as the same credits and core classes are offered)
- Remediation or enrichment services (e.g., clubs or tutoring)
- Staffing structure
- Curriculum materials (e.g., textbooks and online programs)

Academic or Instructional Programming



The document outlines two windows for submitting amendments and a timeline of actions that will occur.

Submission Windows: July 1 – July 15 January 1 – January 15

June December

 Board approves amendments July 1 – July 15 Jan 1 – Jan 15

 Board submits amendments to OEI July 15 – July 31 Jan 15 – Jan 31

- OEI reviews amendments
- OEI responds to board

August 1 February 1

 If/when approved, board may adopt amendments

Amendments submitted outside of the windows will be reviewed during the next open window.



There are very **limited instances** where an **immediate amendment** may be necessary and should be submitted outside of the windows.

An IMMEDIATE amendment is necessary in the following situation(s):

• Enter into, or termination of, contract with CMO, EMO or ESP

In this case, the situation should be communicated to the Director of Charter Schools as soon as possible and arrangements for an amendment will be made.

### **Charter Amendments for All Schools**



OEI is requiring two charter amendments from all schools; as in the past, we will prepare these amendments for you, but amendments should be signed and submitted by July 15.

Performance Framework Amendment

School-specific Non-academic goals

Amendment







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### **OEI Updates & 2014-15 Meeting Calendar**

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### **OEI Updates: Long-term Structure**



OEI strongly believes in authorizer quality and performance, and is committed to serving you at a high level. In order to continue regular, transparent meetings and maintain oversight processes, our team structure will have to shift to accommodate the growing number of schools.

#### **Current Structure**

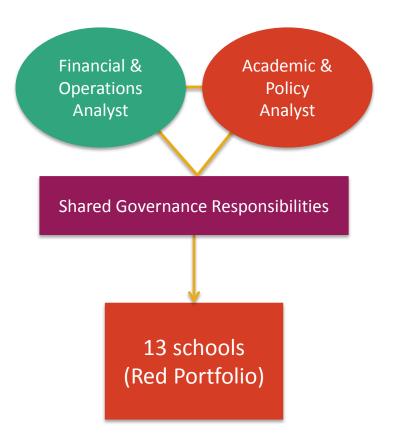
#### **2014-15 Structure**

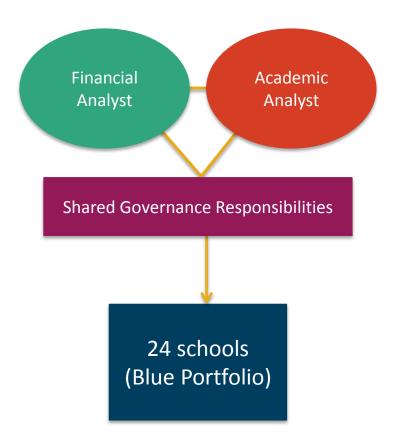
### **Long-term Structure**

- All schools under three analysts
- Quarterly meetings with each analyst → monthly meetings for school leaders
- Schools divided under teams of two analysts
- Quarterly meetings with each analyst → monthly meetings for school leaders
- Schools divided under teams of three analysts
- Quarterly meetings with each analyst → monthly meetings for school leaders



OEI strongly believes in authorizer quality and performance, and is committed to serving you at a high level. In order to continue regular, transparent meetings and maintain oversight processes, our team structure will have to shift to accommodate the growing number of schools.







Groups were assembled to allow for the least amount of divide between boards and networks.

Fin/Ops Analyst: TBD **Red Portfolio** Acad/Policy Analyst: KH Financial Analyst: CHF **Blue Portfolio** Academic Analyst: JG

### **2014-15 Meeting Calendar Structure**



The calendar structure will allow OEI staff to interface more regularly with board chairs, and calendar in time to make analysts available to school leaders.

	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
AAs	X			urs		Hours	Х		Х	hrs		
FAs		Х		Office Hours	Х	се Но		Х		Office Hours/Ch	Х	Charter WS
All			Chrs	) U		Office				Hor		
						\						

Board chair meetings do not currently appear on the calendar of meeting dates. Analysts will reach out to board chairs directly to schedule these meetings.

### **OEI Event Dates**



OEI plans to host several events for school leaders, board chairs and financial personnel during the 2014-15 school year. We hope you'll join us!

Tues, Sept 23	■ Board Chair Meet & Greet				
Wed, Oct 1	Fall Financial Roundtable				
Wed, Feb 25	■ School Leader Event – Topic TBD				
Wed, Apri 15	Spring Financial Roundtable				
Wed, May 6	■ Board Chair Event — Topic TBD				
Wed, June 3	■ 2015 Policy Briefing				



OEI commits to only rescheduling meetings due to illness or emergency. We ask that, in the same vein, you identify conflicts now and commit to rescheduling only under dire circumstances.

Review meeting dates as soon as possible.

**Action Steps** 

Identify conflicts & notify the corresponding analyst <u>by July 1</u>.

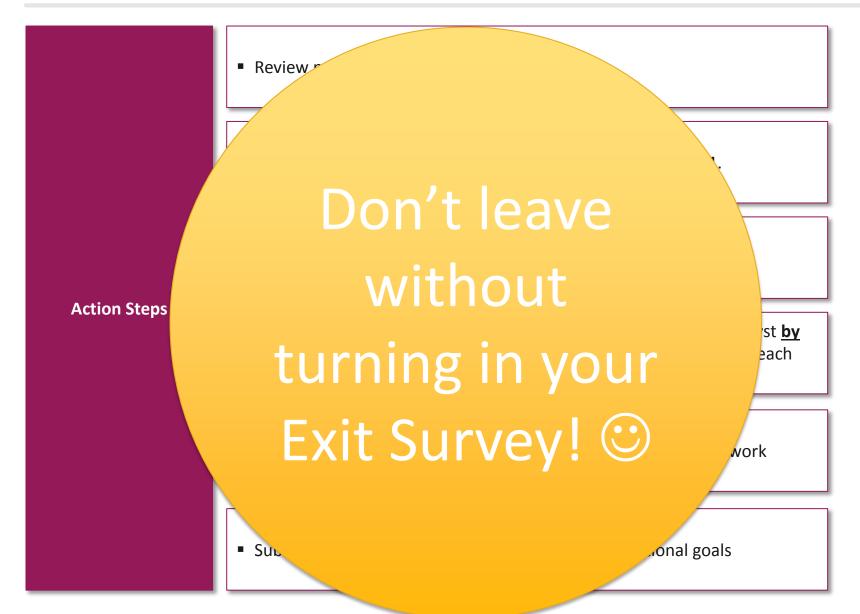
Accept your outlook invitations from analysts <u>by July 7</u>.

Board Chairs Only – Look for an introduction email from your analyst by July 15. If you would like to schedule your meeting sooner, please reach out to your analyst via e-mail.











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**NWEA Presentation (Optional)** 





# Adaptive Assessments Promoting Student Engagement and Personalization

Kristy Smith

NWEA-National Account Team



### Northwest Evaluation Association NWEA

Research based, not-for-profit, mission-driven

6,800+ partners worldwide

Largest growth database: 4.5

Billion+ records

Proprietary RIT Scale: Stable for

20+ years

Key to our mission: 35+ years of

research, advocacy





### **Assessment Components**

### Measures of Academic Progress-MAP®

### Reading

- Grades 2-5
- Grades 6+

# Language Usage Mathematics

- Grades 2-5
- Grades 6+

End-of-Course Assessments (Math)

### Science

Grades 3-10

### MAP for Primary Grades- MPG®

### Reading

Grades K-2

### **Mathematics**

Grades K-2

### Screening

- Early Literacy
- Early Numeracy

### Skills Checklists

- Early Literacy
- Early Numeracy



# What info can you obtain MAP. & MPG.?

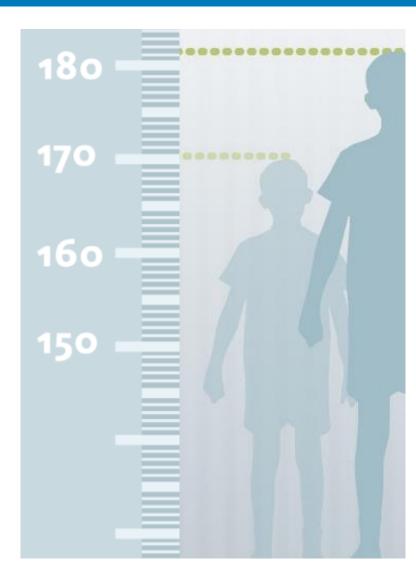


- Projected Proficiency- ACT, State Assessment
- •Center on RTI at American Institute for Research-Approved Universal Screening
  Tool
- Gifted & Talented Screening/Identification
- Program placement guidelines
- Differentiated Instruction-group placement
- \*Diagnostic instructional level data
- •Student growth data
- Normative data-Largest GRD in the World
- •Growth trajectories
- •Intake data on enrollment
- Grade, school and district-wide data
- •Reading Lexile level



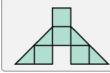
### RIT Scale as a Yardstick

Rasch Unit
Stable equal-interval scale
Linked to curriculum
Achievement scale
Measures item difficulty
Shows growth over time
Grade-independent

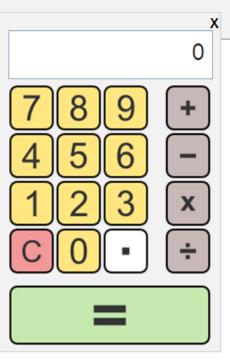




#### What is the area?



- A. 3 square units
- B. 8 square units
- C. 4 square units
- D. 9 square units
- E. 6 square units



Read the passage.	
The man in the corner pushed aside his glass, and leant across the table. "Mysteries!" he commented. "There is no such thing as a mystery in connection with any crime, provided intelligence is brought to bear upon its	•
investigation."  Very much astonished Polly Burton looked over the top of her newspaper, and fixed a pair of very severe, coldly inquiring brown eyes upon him.	
****	
She looked at him and frowned; the next moment she smiled. Miss Burton (of the <u>Evening Observer</u> ) had a keen sense of humour, which two years' association with the British Press had not succeeded in destroying, and the appearance of the man was sufficient to tickle the most ultra-morose fancy. Polly	■
thought to herself that she had never seen any one so pale, so thin, with such funny light-coloured hair, brushed very smoothly across the top of a very obviously bald crown. He looked so timid and nervous as he fidgeted incessantly with a piece of string; his long, lean, and trembling fingers tying and untying it into knots	
of wonderful and complicated proportions.	
Having carefully studied every detail of the quaint personality Polly felt more <u>amiable</u> .	

"And yet," she remarked kindly but authoritatively, "this article, in an otherwise well-informed journal, will tell you that, even within the last year, no fewer than six crimes have completely baffled the police, and the perpetrators of them are still at large."

"Pardon me," he said gently, "I never for a moment ventured to suggest that there were no mysteries to the *police*; I merely remarked that there were none where intelligence was brought to bear upon the investigation of crime."

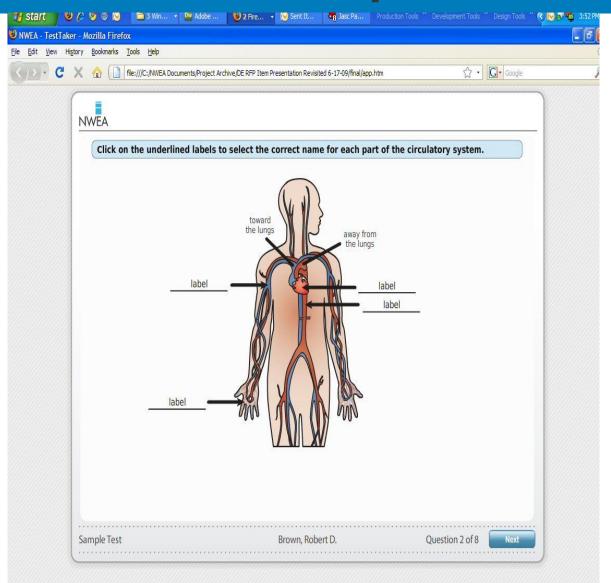
#### Which word most nearly means the same as "amiable" as it is used in this passage?

)	Ι.	COL	ш	us	eu

- 2. friendly
- 3. annoyed
- 4. joyous

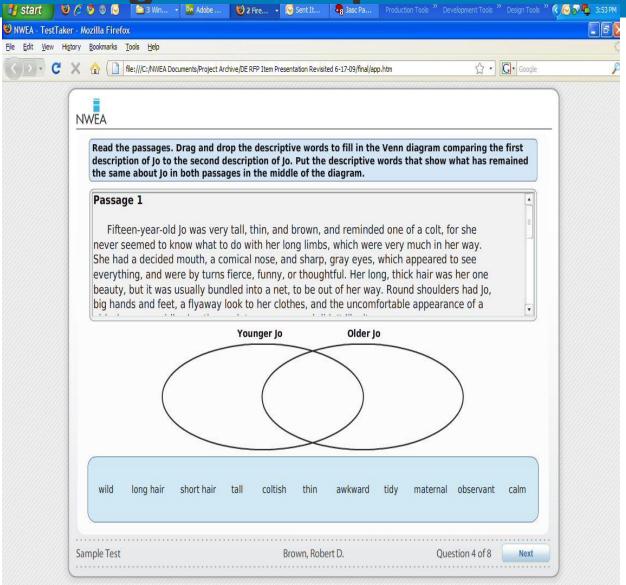


# **Item With Dropdown Lists**



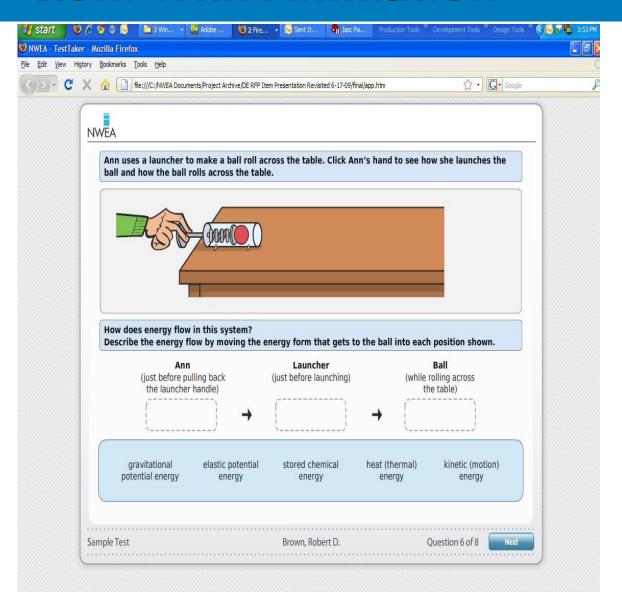


# 





### **Item With Animation**





### **Polytomous Item**

How did the	invention of t	he telephone	most affect the	way peop	le lived in	the 1800s?

- A. Many people moved to the cities.
- B. Women got new jobs as operators.
- C. Communication became faster and easier.
- D. Travel by train was not necessary anymore.



# **Scoring Explanation**

Scoring Explanation for item 500	Justifications	
Full credit	C. Communication became faster and easier	This is the correct answer. This demonstrates full understanding of the impact of the telephone in the 1800s.
Partial credit	B. Women got new jobs as operators	This is a partially correct answer.  This demonstrates a partial understanding of the impact of the telephone in the 1800s.  While women did have added employment opportunities, the impact of the telephone on communication is universal and ubiquitous.
No credit	Options A and D	





## Follow-up contact: Kristy Smith 503-502-4860 Kristy.smith@nwea.org

